FIG. 1

10

50
External Application Server(s)
External Marketing Data

70
Customer Channels
Call Center
Lit./ Email Distr.
Media

Internet, VPN, Leased Lines, Etc.

40
Web Server
PROC RAM
42
Non-Vol. Mem.
Portal Prog.

Portable PC1
Portable PC2
. . .

PC1
PC2
PC3
. . .

WAN/ LAN

30
File Server
PROC. RAM
Non-Vol. Mem.
Customer Info Files 31
Transaction Files 32
Campaign Files 33
. . .

20
Application Server
PROC. RAM
Non-Vol. Mem
Campaign Mgt. App. 24
Workflow App. 25
. . .
Analysis & Reporting App. 21
Analytical Modeling App. 22
Campaign Optimization App. 23

FIG. 2

Phase 1 Analyze — 2-4 Days

Phase 2 Plan and Develop — 2-4 Days

Phase 3 Optimize/Refine — 1-2 Days

Phase 4 Fulfill/Execute — n Days

Phase 5 Measure — 1-2 Days

Marketing

Marketing Management

- Collect Data/ Test Ideas — 102
- Refine & Analyze Data — 114
- Define Segments/ Programs — 116
- Plan Campaigns — 122
- Generate/ Refine Lists — 124
- Run Campaigns — 134
- Review Results — 142

Agency

- Conduct Surveys/ Research — 104
- Provide Research Data — 106
- Create Content/ Offers — 118
- Test Offers/ Campaigns — 126
- Conduct Surveys/ Research — 144

Database Marketing

- Provide Statistical Models — 112
- Model Lists/ Segments — 130
- 132

Info Services

- Source & Cleanse Data — 108
- Support Data/Tool Requests — 110
- Support Data/Tool Requests — 120
- Support Data/Tool Requests — 128
- Create Ad-Hoc Reports — 146

Operations

- Operate Tele- marketing — 128
- Operate Web Site — 136
- Operate Service Center — 138
- Provide Operations Reports — 140

FIGURE "10"

Customer Interaction Channels ~70

PORTAL LAYER ~42

WORKBENCH COMPONENT ~46

ROLE PORTAL COMPONENT ~44

WORKFLOW PROCESS ENABLEMENT ~25

Analysis and Reporting ~21

Analytic Modeling ~22

Campaign Optimi- zation ~23

Campaign Mgt. ~24

• • •

DATA INTEGRATION LAYER (CAR) ~80

Customer Info ~31

Trans- actions ~32

Campaigns ~33

• • •

Data Sources ~60

FIG. 3

FIG. 4

42

PORTAL LAYER

44

ROLE PORTAL COMPONENT

- EXECUTIVE
- MARKETING MANAGER
- DATA ANALYST

  o
  o
  o

46

WORKBENCH COMPONENT

- HOMEPAGE
  - SCORECARDS
  - TASKS (TO DO's)
  - ALERTS
  - COMPANY NEWS
  - OTHER NEWS
  - WEBSITE LINKS
- ACTIVITIES PAGE
  - TASKS (TO DO's)
  - RESOURCES AND REFERENCES
- MARKETING CAMPAIGNS PAGE
  - S/W APP. ACCESS
  - CAMPAIGN INFO AND METRICS.
- CUSTOMER ANALYSIS PAGE
  - S/W APP. ACCESS
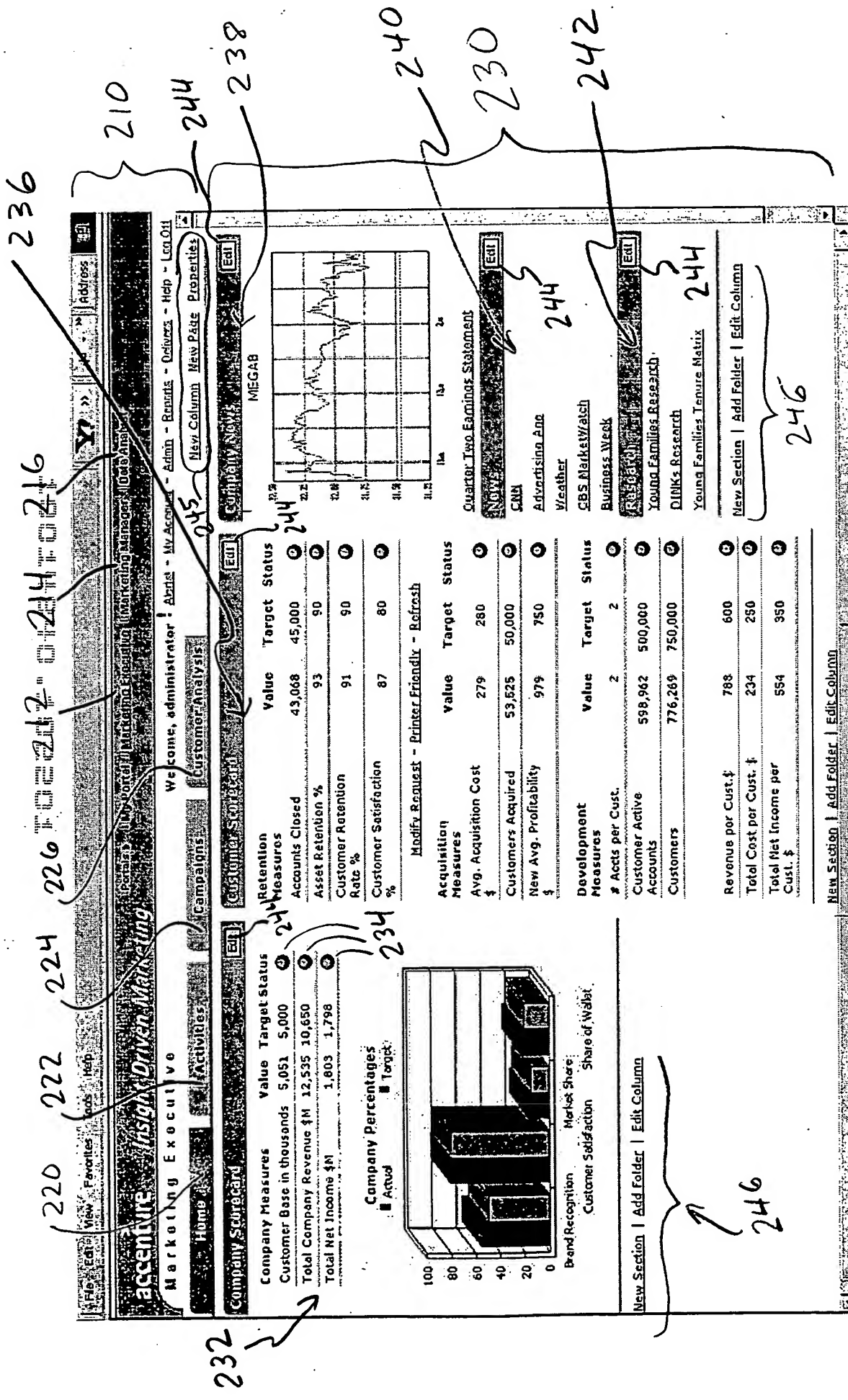 - ANALYTICS

    o
    o
    o

Figure includes a browser window screenshot labeled with reference numbers.

| File | Edit | View | Favorites | Tools | Help | | Address |

accenture *Insight Driven Marketing*

Marketing Executive

| Home | Activities | Campaigns | Customer/Analysis |

Welcome, administrator | Admin – Reports – Delivers – Help – Log Off

Portal | Marketing Executive | Marketing Manager | Data Analysis

New Column New Page Properties

Company Scorecard   [Edit]

Company Measures	Value	Target	Status
Customer Base in thousands	5,051	5,000	●
Total Company Revenue $M	12,535	10,650	●
Total Net Income $M	1,803	1,798	●

Company Percentages
■ Actual ■ Target

100
80
60
40
20
0

Brand Recognition Customer Satisfaction Market Share Share of Wallet

New Section | Add Folder | Edit Column

Customer Scorecard   [Edit]

Retention Measures	Value	Target	Status
Accounts Closed	43,068	45,000	●
Asset Retention %	93	90	●
Customer Retention Rate %	91	90	●
Customer Satisfaction %	87	80	●

Modify Request – Printer Friendly – Refresh

Acquisition Measures	Value	Target	Status
Avg. Acquisition Cost $	279	280	●
Customers Acquired	53,525	50,000	●
New Avg. Profitability $	979	750	●

Development Measures	Value	Target	Status
# Accts per Cust.	2	2	●
Customer Active Accounts	598,962	500,000	●
Customers	776,269	750,000	●
Revenue per Cust.$	788	600	●
Total Cost per Cust. $	234	250	●
Total Net Income per Cust. $	554	350	●

New Section | Add Folder | Edit Column

Company News   [Edit]

MEGAB

Quarter Two Earnings Statement

NEWS
CNN
Advertising Age
Weather
CBS MarketWatch
Business Week

Research   [Edit]
Young Families Research
DINKs Research
Young Families Tenure Matrix

New Section | Add Folder | Edit Column

FIG. 5

330

336

332 ꟽECCꟽE CꟽꟽCꟽꟽꟽ·CꟽꟽE

accenture ꟽ Insight Driven Marketing   Catalyst · My Portal · Marketing · Executive Utility · Unit Manager | Edit Analyst]

Marketing Manager   Welcome, Administrator · Alerts · My Account · Admin · Reports · Delivers · Help · Log Off

New Column · New Page · Properties

| Home | Activities | Campaigns | Customer Analysis |

Marketing Activities [Edit]   234

Retention
- Loyalty Program Update ● ● ● ●
- Retain High Value Singles ● ● ●
- Retain High Value Families ● ● ●
- Retain High Value DINKs ● ● ● ●

Development
- Grow Low Trans. Brokerage Accts.
- Grow Average Trans. Value
- Develop Day Trading Accts.

Acquisition
- Cross Sell Family Home Loans ● ●
- Cross Sell CC Customers ● ●

My Tasks [Edit]   350

FILTER: [Maria Martinez ▾]   352   354

Insight Driven Marketing Activities
⊟ Fall 2001 Marketing Strategy
  ⊞ Understand Customers & Market
  ⊞ Develop Customer Strategy
  ⊞ Retention
  ⊞ Development
  ⊞ Acquisition
  ⊞ Drive Loyal Behavior Among Ne...

Customer Scorecard [Edit]

Retention Measures	Value	Target	Status
Accounts Closed	43,068	45,000	●
Asset Retention %	93	90	●
Customer Retention Rate %	91	90	●
Customer Satisfaction %	87	80	●

Modify Request – Printer Friendly – Refresh

Acquisition Measures	Value	Target	Status
Avg. Acquisition Cost $	279	280	●
Customers Acquired	53,525	50,000	●
New Avg. Profitability $	979	750	●

Development Measures	Value	Target	Status
New Customer Retention %	82	80	●
Prospect Conversion %	22	20	●
Sales Cycle Time in days	21	25	●

Development Measures	Value	Target	Status
# Accts per Cust.	2	2	●
Customer Active Accounts	598,962	500,000	●
Customers	776,269	750,000	●
Operating Cost per Customer $	27	20	●
Selling Cost per Customer $	46	40	●
Service Costs per Customer $	160	150	●

New Section | Add Folder | Edit Column   356

Company News [Edit]

MEGAB

Quarter Two Earnings Statement

News [Edit]
- Advertising Age
- CNN
- The Weather Channel
- Business Week
- The Wall Street Journal

Research [Edit]
- Young Families Research
- Families with Teens Research
- Young Families Tenure Matrix

New Section | Add Folder | Edit Column

FIG. 6

FIG. 7

accenture › *Insight Driven Marketing*

Data Analyst

Welcome, Administrator ! Alerts – My Account – Admin – Reports – Delivers – Data Analyst

New Column New Page Properties

| Home | Activities | Customer Analysis | Campaigns |

Marketing Activities [Edit]

Retention
- Loyalty Program Update
- Retain High Value Singles
- Retain High Value Families
- Retain High Value DINKs

Development
- Grow Low Trans.
- Brokerage Accts.
- Grow Average Trans. Value
- Develop Day Trading Accts.

Campaign Scorecard [Edit]

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Conversion Rate %
Acquisition	Acquire Young Professionals	1,994,333	39,708	2.0%	34.9%
	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	40.1%
	Cross Sell Family Home Loans	13,855	570	4 %	31.8%
Development	Develop Day Trading Accounts	20,823	800	3.8%	46.0%
	Grow Low Transaction Brokerage Accounts	917,858	45,787	5.0%	50.4%
Retention	Loyalty Program Update	3,250,078	96,719	3.0%	39.8%
	Retain High Value DINKYs	964,090	29,038	3.0%	30.4%
	Retain High Value Families	1,243,444	74,283	6.0%	44.9%
	Retain High Value Young Singles	1,712,270	34,063	2.0%	24.7%
	Retain Young Families	60,000	6,000	10.0%	10.0%

New Section | Add Folder | Edit Column

Company News [Edit]

MEGAB

Quarter Two Earnings Statement

News
CNN
Weather
Advertising Age

Research [Edit]
- Customer Analytic Record
- Brokerage Churn Model

[REFRESH]

New Section | Add Folder | Edit Column

My Tasks [Edit]

FILTER: [Dan Duali ▼]

Insight Driven Marketing Activities
Fall 2001 Marketing Strategy
- ⊞ Understand Customers & Ma...
- ⊞ ● Develop Customer Strategy
  - ⊞ ● Retention
  - ⊞ ● Development
  - ⊞ ● Acquisition
  - ⊞ ● Drive Loyal Behavior Among...
  - ⊞ ● Win-back Initiative to Rece...
  - ⊞ ● Defection Prevention Progra...

438 430 440 442 432 460 450

accenture › Insight Driven Marketing

Marketing Executive

Welcome, Administrator ! Alerts - My Account - Admin - Reports - Delivers - Help - Log Off

New Column New Page Properties

Memo Activities Campaigns Customer Analysis

Task Details

FILTER: Maria Martinez

Insight Driven Marketing Activities
- Fall 2001 Marketing Strategy
  - Understand Customers & Markets
  - Develop Customer Strategy
    - Retention
    - Development
    - Acquisition
      - Drive Loyal Behavior Among Newly Acquired Custo
      - Win-back Initiative to Recent Defectors
      - Defection Prevention Program
        - Initiate Program

        Initiate Customer Strategy

Task Details   Edit

Assignee   Maria Martinez — Marketing Campaign
                  Manager
Phone Number   (612)277-8778
Work Item: Initiate Program
Status: Impacted
Date Assigned   20-Jul-01
Date Due: 25-Jul-01
Input Forms: Input Program Name
Description: To start a new program strategy process, open
                  the attached form and enter an identifying
                  name for this process. This name will be used
                  to maintain relationships later on in the process
                  (es)

                  Actions:

                  Continue   Reassign

                                                                    Edit

Online Reference

R09 CompanyAssessment-RPI report.doc
R20b Objectives Memo.doc
R20 BusinessObjectives-KPI Report.doc

FIG.8

630

610 650 672 660

accenture Design-Driven Marketing

Marketing Executive

Welcome, Administrator - Alerts - My Account - Admin - Reports - Delivers - Help - Log Off

Home | Campaigns | Activities | Customer/Analysis

New Column New Page Properties

Active Campaigns [Edit]

Program Type	Campaign Description	Est ROI	ROI Target	Status
Acquisition	Acquire Young Professionals	8.15%	8.00%	●
	Cross Sell Credit Card Consumers	8.70%	8.00%	●
	Cross Sell Family Home Loans	13.09%	12.80%	●
Development	Develop Day Trading Accounts	10.05%	10.00%	●
	Grow Average Transaction Value	10.70%	10.20%	●
	Grow Low Transaction Brokerage Accounts	16.20%	15.00%	●
	Loyalty Program Update	9.90%	8.50%	●
Retention	Retain High Value DINKs	10.80%	9.50%	●
	Retain High Value Empty Nesters	12.43%	12.25%	●
	Retain High Value Families	11.90%	11.30%	●
	Retain High Value Young Singles	14.10%	14.00%	●
	Retain Young ...			●

Campaign Selection Criteria

Promo Type	Promo Description	Channel	Promo Data
[All Choices]	[All Choices]	[All Choices]	[Select]

[Edit]

Campaign History [Edit]

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Purchase Rate %	Conversion Rate %
Acquisition	Acquire Young Professionals	1,994,333	39,708	2.0%	0.7%	34.9%
	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	2.0%	40.1%
	Cross Sell Family Home Loans	13,855	570	4.1%	1.3%	31.8%
Development	Develop Day Trading Accounts	20,823	800	3.8%	1.8%	46.0%
	Grow Low Transaction Brokerage Accounts	917,058	45,787	5.0%	2.5%	50.4%
	Loyalty Program Update	3,250,078	96,719	3.0%	1.2%	39.8%
Retention	Retain High Value DINKYs	954,090	29,038	3.0%	0.9%	30.4%
	Retain High Value Families	1,243,443	74,283	6.0%	2.7%	44.9%
	Retain High Value Young Singles	1,712,270	34,063	2.0%	0.5%	24.7%
	Retain Young Families	60,000	6,000	10.0%	1.0%	10.0%

Modify Request - Printer Friendly - Refresh - Download Data
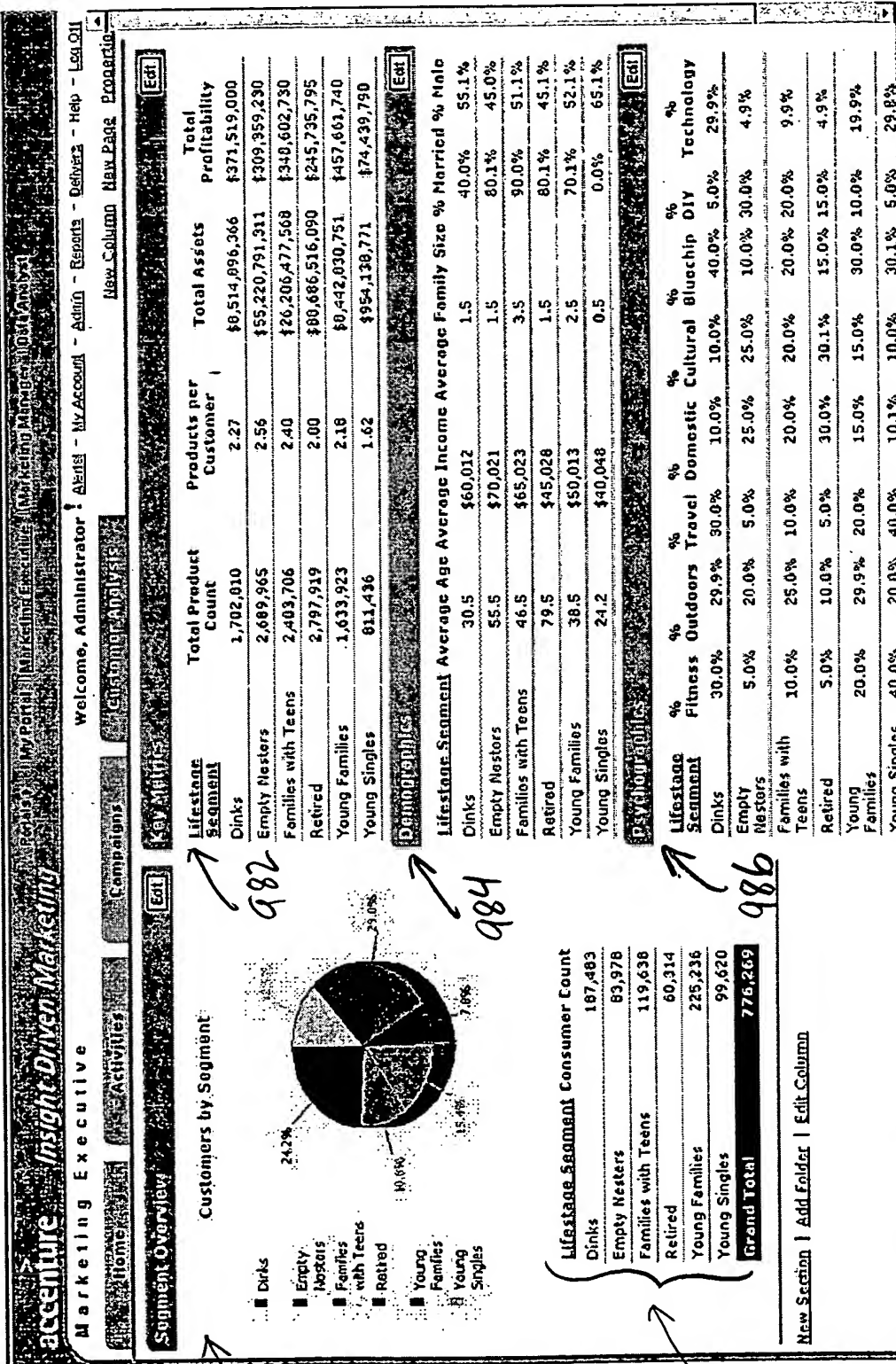
New Section | Add Folder | Edit Column

FIG. 9

FIG. 10

accenture · Insight Driven Marketing

Marketing Manage...

Welcome, Administrator · ...

New Column · New Page · Properties

Campaign Management Application

Launch Campaign Management Application

Active Campaigns

Program Type	Campaign Description	Est. ROI	ROI Target	Status
Acquisition	Acquire Young Professionals	6.15%	8.00%	O
	Cross Sell Credit Card Consumers	8.70%	8.00%	O
	Cross Sell Family Home Loans	13.09%	12.80%	O
Development	Develop Day Trading Accounts	10.05%	10.00%	O
	Grow Average Value	10.70%	10.20%	O
	Grow Low Transaction Brokerage Accounts	16.20%	15.00%	O
Retention	Loyalty Program Update	9.90%	8.50%	O
	Retain High Value DINKs	10.80%	9.50%	O
	Retain High Value Empty Nesters	12.43%	12.25%	O
	Retain High Value Families	11.90%	11.30%	O
	Retain High			O

Campaign Selection Criteria

Promo Type [All Choices]   Promo Description [All Choices]   Channel [All Choices]   Promo Date

Campaign History

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Purchase Rate %	Conversion Rate %
Acquisition	Acquire Young Professionals	1,994,333	39,708	2.0%	0.7%	34.9%
	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	2.0%	40.1%
	Cross Sell Family Home Loans	13,855	570	4.1%	1.3%	31.8%
Development	Develop Day Trading Accounts	20,823	800	3.8%	1.8%	46.0%
	Grow Low Transaction Brokerage Accounts	917,858	45,787	5.0%	2.5%	50.1%
	Loyalty Program Update	3,250,078	96,719	3.0%	1.2%	39.8%
Retention	Retain High Value DINKYs	964,090	29,038	3.0%	0.9%	30.4%
	Retain High Value Families	1,243,443	74,203	6.0%	2.7%	44.9%
	Retain High Value Young Singles	1,712,270	34,063	2.0%	0.5%	24.7%
	Retain Young Families	60,000	6,000	10.0%	1.0%	10.0%

New Section | Add Folder | Edit Column

accenture *Insight Driven Marketing*   Portal - My Account - Admin - Reports - Delvers - Help - LogOff

Data Analyst

Home | Activities | Campaigns | Customer Analysis

Welcome, administrator

New Column   New Page   Properties

Data Mining Applications
Launch Analytical Modeling Tool

Add an Analytical Report:

Please enter only the name of the folder of the Analytical Report that was created. (*Required Field)

Rename or Delete a link.

*Folder Name:
Folder Alias:
(If you would like to enter a more descriptive text for the link name)

Segment Overview

Customers by Segment

- Dinks
- Empty Nesters
- Familes with Teens
- Retired
- Young Familes
- Young Singles

Key Metrics   [Edit]

Lifestage Segment	Total Product Count	Products per Customer	Total Assets	Total Profitability
Dinks	1,725,053	2.30	$8,514,896,366	$371,519,000
Empty Nesters	2,681,563	2.55	$55,220,791,311	$309,959,230
Families with Teens	2,401,192	3.40	$26,206,477,560	$348,602,730
Retired	2,701,498	2.70	$88,606,516,090	$245,735,795
Young Families	1,680,597	2.24	$8,442,030,751	$457,661,740
Young Singles	825,345	1.65	$954,130,771	$74,439,790

Demographics   [Edit]

Lifestage Segment	Average Age	Average Income	Average Family Size	% Married	% Male
Dinks	30.5	$60,012	1.5	40.0%	55.1%
Empty Nesters	55.5	$70,021	1.5	80.1%	45.0%
Families with Teens	46.5	$65,023	3.5	90.0%	51.1%
Retired	79.5	$45,028	1.5	80.1%	45.1%
Young Families	38.5	$50,013	2.5	70.1%	52.1%
Young Singles	24.2	$40,040	0.5	0.0%	65.1%

Psychographics   [Edit]

Lifestage Segment	% Fitness	% Outdoors	% Travel	% Domestic	% Cultural	% Bluechip	% DIY	% Technology
Dinks	30.0%	29.9%	30.0%	10.0%	10.0%	40.0%	5.0%	29.9%
Empty Nesters	5.0%	20.0%	25.0%	25.0%	25.0%	10.0%	30.0%	4.9%
Families with Teens	10.0%	25.0%	10.0%	20.0%	20.0%	20.0%	20.0%	9.9%
Retired	5.0%	10.0%	5.0%	30.0%	30.1%	20.0%	20.0%	4.9%
Young Families	20.0%	29.9%	20.0%	15.0%	15.0%	15.0%	15.0%	19.9%

830

882

876

878

880

884

886

FIG. 11

accenture > Insight Driven Marketing

Marketing Executive

Home | Activities | Campaigns | Customer Analysis

Segment Overview [Edit]

Customers by Segment

- Dinks — 24.2%
- Empty Nesters — 10.8%
- Families with Teens — 15.4%
- Retired — 7.0%
- Young Families — 29.0%
- Young Singles

Lifestage Segment Consumer Count

Lifestage Segment	Count
Dinks	187,483
Empty Nesters	83,978
Families with Teens	119,638
Retired	60,314
Young Families	225,236
Young Singles	99,620
Grand Total	**776,269**

New Section | Add Folder | Edit Column

Key Metrics [Edit]

Lifestage Segment	Total Product Count	Products per Customer	Total Assets	Total Profitability
Dinks	1,702,010	2.27	$8,514,096,366	$371,519,000
Empty Nesters	2,689,965	2.56	$55,220,791,911	$309,959,230
Families with Teens	2,403,706	2.40	$26,206,477,568	$348,602,730
Retired	2,797,919	2.00	$80,686,516,090	$245,735,795
Young Families	1,633,923	2.18	$8,442,030,751	$457,661,740
Young Singles	811,436	1.62	$954,138,771	$74,439,790

Demographics [Edit]

Lifestage Segment	Average Age	Average Income	Average Family Size	% Married	% Male
Dinks	30.5	$60,012	1.5	40.0%	55.1%
Empty Nesters	55.5	$70,021	1.5	80.1%	45.0%
Families with Teens	46.5	$65,023	3.5	90.0%	51.1%
Retired	79.5	$45,028	1.5	80.1%	45.1%
Young Families	38.5	$50,013	2.5	70.1%	52.1%
Young Singles	24.2	$40,048	0.5	0.0%	65.1%

Psychographics [Edit]

Lifestage Segment	% Fitness	% Outdoors	% Travel	% Domestic	% Cultural	% Bluechip	% DIY	% Technology
Dinks	30.0%	29.9%	30.0%	10.0%	10.0%	40.0%	5.0%	29.9%
Empty Nesters	5.0%	20.0%	5.0%	25.0%	25.0%	10.0%	30.0%	4.9%
Families with Teens	10.0%	25.0%	10.0%	20.0%	20.0%	20.0%	20.0%	9.9%
Retired	5.0%	10.0%	5.0%	30.0%	30.1%	15.0%	15.0%	4.9%
Young Families	20.0%	29.9%	20.0%	15.0%	15.0%	30.0%	10.0%	19.9%
Young Singles	40.0%	20.0%	40.0%	10.1%	10.0%	30.1%	5.0%	29.8%

930

980

982

984

986

988

FIG. 12

FIG. 13A

ANATOMY OF A MARKETING CAMPAIGN: THEN AND NOW
26 WEEKS VS. 26 MINUTES

26 Weeks: For many companies today, moving from marketing idea to campaign execution is a long, laborious series of steps. Collaboration is hindered by functional silos. Data are gathered in batch from external departments and outside agencies. By the time the campaign is out the door, the data have aged, leaving opportunity to more quickly moving competitors.

Marketing maverick comes up with idea

Marketing maverick tests idea with a few people

MON

Marketing maverick asks IS to do an extract based on concept

WED

First extract comes back

FRI

Marketing maverick checks out the data

Marketing maverick asks analytics to do some predictive modeling

MON

1 2 3 4 5 6 7 8 9 10 11 12 13
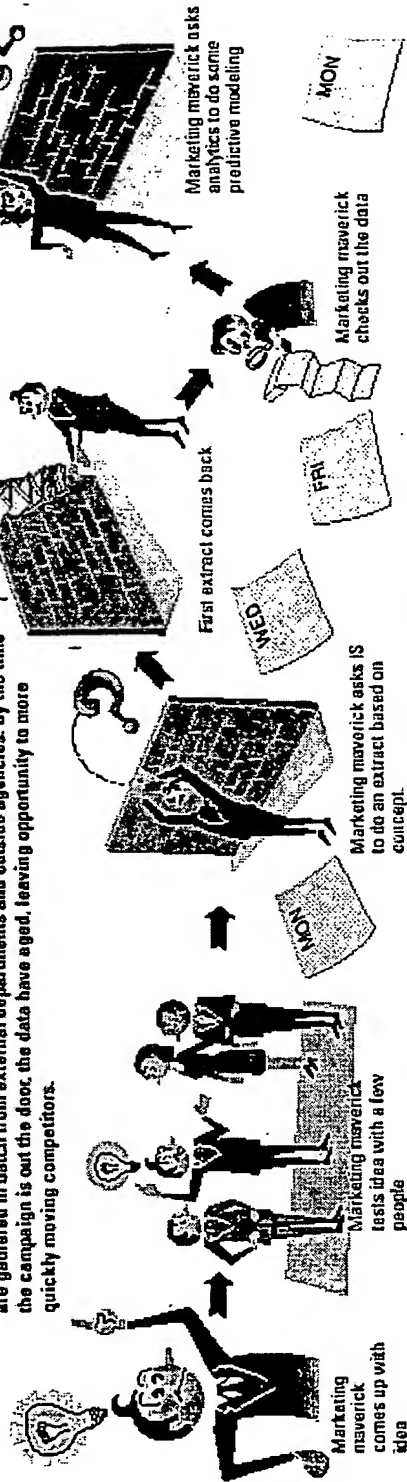
26 Minutes: Gathered in a quality circle, the cross-functional marketing team views analysis of real-time data, brainstorms ideas, and assigns responsibilities. With integrated tools and data at their fingertips, they are able to move quickly, employing technology to integrate customer data, content, and fulfillment to deliver the marketing campaign—getting it right the first time.
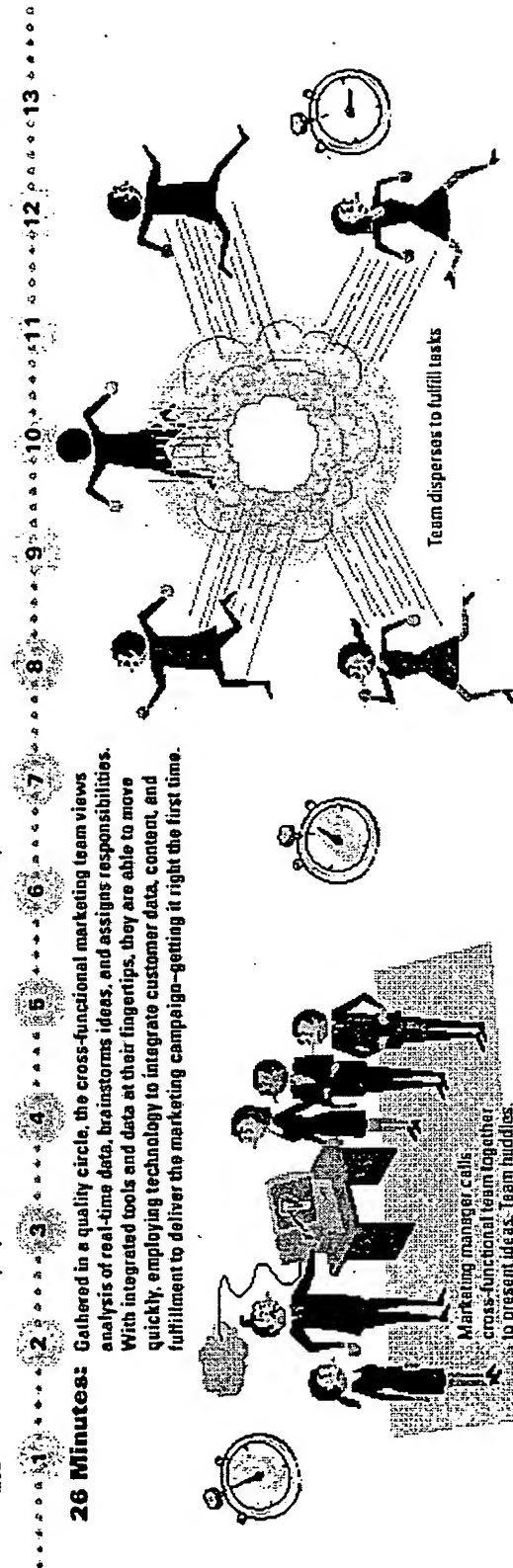
Marketing manager calls cross-functional team together to present ideas: Team huddles.

Team disperses to fulfill tasks

FIG. 13B

Campaign is launched

Campaign is sent off to fulfillment house

FRI

MON

Agency comes back with creative packaging

Outside agency comes in with a view of data/segmentation

WED

Campaign is launched, while team gears up for next campaign

FRI

IS comes back with another extract

WED

Analytic types come back with a segmentation

14 15 16 17 18 19 20 21 22 23 24 25 26

"Pull up previous campaigns."

"Check with call center to determine scheduling."

"Check for fit with existing campaigns."

"Run another model."